



## RFP Development GUIDELINES

**This document only addresses the PMO perspective for RFP development. Work directly with your Purchasing Agent to ensure compliance with applicable fiscal, procurement, and personnel rules.**

- I. PREREQUISITE:** The following should be completed and approved by the project sponsors, CIO, and OIT/IMC prior to the development of an RFP:
1. Information Technology Project Plan (ITPP)
  2. Cost Benefit Analysis
  3. Architectural Scorecard
  4. Project Charter (formal authorization of the project)

Most of these forms are included in the annual planning & budgeting process – contact the OIT/PMO for these forms and/or support in all phases of project management: [oitpmo@state.co.us](mailto:oitpmo@state.co.us)

- II. IT POLICIES/STANDARDS:** all state agency IT projects must comply with the State's IT policies, standards, and/or guidelines – located on the OIT/IMC website under IMC publications:  
[http://www.oit.state.co.us/commissions/imc\\_documents.asp](http://www.oit.state.co.us/commissions/imc_documents.asp)

**III. TIPS:**

**General Tips:**

- Request For Proposals are generally used for projects over \$50,000 when considerations such as technical skills and technical approach are paramount for the success of your project and the required technical expertise and/or resources are not available within the department.
- Contact State Purchasing or your agency purchasing office as early as possible in the planning process.
- The RFP content should reflect the size, scope and complexity of the project.
- Structure the RFP to facilitate accurate and complete responses from prospective offerors – i.e., too many requirements may prompt offerors to submit proposals based on addressing those requirements rather than providing needed solutions. In developing requirements a focus on

capturing and specifying the performance, functional, and interface requirements to detail the technical specifications helps achieve more effective vendor proposals and minimize the likelihood of change requests.

- Keep the RFP evaluation factors flexible enough to allow consideration of offeror suggestions for better ways to satisfy the requirements.
- Review various relevant state agency RFPs located on State Purchasing BIDS:

<http://www.gssa.state.co.us/purchasi.nsf/informational+pages/purchasing+home+page?opendocument>

**PM Action Tips:**

**Identify any/all actions that the Project Management Team can take to ensure the most effective RFP and vendor selection that is in the best interest of the State, including:**

- Review relevant historical information for consideration and/or decision-making regarding development of the RFP.
- Identify critical success factors for the RFP – how and when will you know the RFP has been effective and successful?
- Establish an RFP Development Committee.
- Develop the draft RFP and conduct comprehensive reviews/assessments for accuracy, completeness, and improvements.
- Begin developing the Communications Plan:
  - identify who the key stakeholders are that need to be informed,
  - identify what information each person/group requires,
  - identify when each person/group needs to be informed,
  - assign (owner) responsibility for specific communications, and
  - identify how (formats) communications will be developed and distributed.
- Establish a Selection Committee.
- Develop scoring and assessment criteria for evaluating offeror proposals.
- **Be sure you are coordinating with your purchasing office throughout this process!**

**Document source Tips:**

**Sources of standardized procurement and/or project management documents, if needed:**

- State Purchasing (contact your purchasing agent).
- Contact State Purchasing or your agency's delegated purchasing office early in the planning process to ensure a successful process.
- OIT/PMO for templates and information regarding key project management phases/processes: initiation, planning, executing, controlling, and closing – located on OIT's website at:  
<http://www.oit.state.co.us/pmo/OIT-PMO-templates.htm>

**IV. Basic components of an RFP – the project size, scope, complexity, and/or uniqueness may dictate special sections or appendices.**

**Cover Page**

- State seal
- name of Department and Division/Program
- name of Project
- RFP #
- Indicate: Request For Proposals
- Indicate: Date (date RFP is finalized/posted)

**Table of Contents**

**Tip: select a numbering sequence that provides for easy reference throughout the RFP process.**

- General Information:
  - Introduction (of project and purpose)
  - Disclaimer (if appropriate)
  - Terms and Definitions (agency/program and/or project specific)
- Background and Overview
  - Department and Division/Program sponsoring the project
  - Entities, Roles & Responsibilities (identify all key parties on the project and their roles and responsibilities)
- Administrative Information (check with State Purchasing or your delegated purchasing office for the most current/updated information)
- Statement of Work  
(Provide relevant, clear, concise and comprehensive information.  
Include all the work the contractor will be required to perform for the project.)
  - General/Business Requirements
  - Technical Requirements

- Planning Requirements
- Project Monitoring Requirements
- Deliverable Review and Assessment Requirements
- Offeror's Response Format
  - Page Limits
  - State Signature Page
  - Transmittal Letter
  - Business Proposal
  - Cost Proposal
- Proposal Evaluation
  - State the Evaluation Factors
  - Explain the Evaluation Process
  - Notice of Intent to Award
  - Non-Award information

**Appendices** - Appendices provide offerors with relevant, detailed and required information and may include the following:

- Federal legislation or standards and/or web links to each.
- State and/or agency specific IT policy, procedures, standards, or guidelines.
- State of Colorado model contract.
- Organizational and/or Team Charts.
- Project Requirements (these may be categorized with each one a separate appendix).
- Technical Requirements or relevant information (these may be categorized with each one a separate appendix).
- Project glossary and/or acronyms and definitions.